

Skills Framework for Financial Services

Programmes that broaden or deepen specific skills and knowledge
for the various job roles in the sector

Sales, After Sales, Distribution and Relationship Management Job Role:
Agency Director/Segment Lead

Full Qualification Programmes	Providers
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Technical Skills and Competencies (TSC)			Modular Programmes	Providers
Category	Title	Proficiency Level		
Customer Relationship and Stakeholder Management	Account Management	5	Agency Management Training Course (AMTC) AMTC - Bridging Course (IBF Level 3) Certified Private Banker Level 3 (Team Leader) - Essential Management and Leadership Skills Part 2	Financial Services Managers Association (FSMA) Financial Services Managers Association (FSMA) Nanyang Technological University, Wealth Management Institute
Business Development and Strategy Management	Business Performance Management	6	Certificate in Commercial Banking for Technology and Operations SMU Certificate in IT Design, Development & Testing (IBF Level 1) ACI-SMU Executive Certificate in Financial Markets Operations (IBF Level 1)	Ngee Ann Polytechnic SMU Academy SMU Academy – Financial Services
Customer Relationship and Stakeholder Management	Channel Management	5	Specialist Diploma in Consumer Banking - Product Development (M3 & M4)	Ngee Ann Polytechnic
Investment and Financial Management	Client Investment Suitability	5	Associate Financial Planner Programme (IBF Level 1) Certified Private Banker Level 1 - Investment Advisory Certified Private Banker Level 1 - Investment Advisory Certificate in Financial Needs Analysis and Plan Construction SGX CSP Module 2: Client Acquisition & Execution Management Private Banking Certification Level 1: Client Relationship Management AWMP Programme II - Investment Advisory (IBF Level 1)	Financial Planning Association of Singapore Nanyang Technological University, Wealth Management Institute Nanyang Technological University, Wealth Management Institute Singapore College of Insurance Limited Singapore Exchange Limited SMU Academy SMU Lee Kong Chian School of Business
Customer Relationship and Stakeholder Management	Customer Acquisition Management	5	AWMP Programme II - Investment Advisory (IBF Level 2)	SMU Lee Kong Chian School of Business
Business Development and Strategy Management	Ethical Culture	5	CFA Singapore Level 2 Preparatory Programme (IBF Level 2/3) CFA Singapore Level 3 Preparatory Programme (IBF Level 2/3) CFA Singapore Portfolio Management Programme (IBF Level 2/3) CFA Singapore Research Programme (IBF Level 2/3) ICA Diploma in Anti-Money Laundering / Counter Financing Terrorism (AML/CFT): Module 2 - Regulatory Advisory (IBF Level 2) ICA Diploma in Governance, Risk and Compliance: Module 2 - Regulatory Advisory [Banking] (IBF Level 2) ICA Diploma in Governance, Risk and Compliance: Module 2 - Regulatory Advisory [Capital Markets] (IBF Level 2) ICA Diploma in Governance, Risk and Compliance: Module 2 - Regulatory Advisory [Insurance] (IBF Level 2) Advanced Diploma in Private Banking - Ethics, Rules and Regulations Certified Private Banker Level 2 - Ethical Conduct Master of Science in Asset and Wealth Management - WM8001 Compliance, Ethics and Tools of Investment Mgt WMI Advanced Wealth Management Programme - Affluent (IBF Level 2/3) Ethical Private Banking Conduct Private Banking Certification Level 2: Ethical Conduct & Rules and Regulations	CFA Society Singapore CFA Society Singapore CFA Society Singapore CFA Society Singapore International Compliance Training Academy Pte. Ltd. International Compliance Training Academy Pte. Ltd. International Compliance Training Academy Pte. Ltd. International Compliance Training Academy Pte. Ltd. Nanyang Technological University, Wealth Management Institute Nanyang Technological University, Wealth Management Institute Nanyang Technological University, Wealth Management Institute Nanyang Technological University, Wealth Management Institute Salmon Thrust Pte Ltd SMU Academy
People Management	Learning and Development	5	Agency Management Training Course (AMTC)	Financial Services Managers Association (FSMA)
Customer Relationship and Stakeholder Management	Partnership Management	5	Specialist Diploma in Consumer Banking - Product Development (M3 & M4)	Ngee Ann Polytechnic

People Management	People Performance Management	5	Agency Management Training Course (AMTC) AMTC - Bridging Course (IBF Level 3)	Financial Services Managers Association (FSMA) Financial Services Managers Association (FSMA)
Customer Relationship and Stakeholder Management	Personal Finance Advisory	5	Business Succession Planning Workshop (IBF Level 2) Certified Financial Planner Programme (IBF Level 2) Chartered Financial Consultant/Singapore (IBF Level 2) ChFC01 - Financial Planning: Process and Environment ChFC02 - Risk Management, Insurance and Retirement Planning ChFC04 - Investments ChFC05 - Plan Construction, Practice Standards and Ethics ChFC06 - Planning for Business Owners and Professionals ChFC07 - Wealth Management and Financial Planning ChFC08 - Financial Planning Applications ChFC09 - Ethics For The Financial Services Professional	Financial Planning Association of Singapore Financial Planning Association of Singapore Singapore College of Insurance Limited Singapore College of Insurance Limited Singapore College of Insurance Limited Singapore College of Insurance Limited Singapore College of Insurance Limited Singapore College of Insurance Limited Singapore College of Insurance Limited Singapore College of Insurance Limited Singapore College of Insurance Limited
Product, Sales and Market Management	Product Advisory	5	CFA Program - Fund Management (IBF Level 1) by AB Maximus CFA Program - Fund Management Plus (IBF Level 1) by AB Maximus CAIA level 1 Certified Private Banker Level 2 Cross Banking (Elective) Specialist Diploma in Consumer Banking - Product Development (M3 & M4) ACI-SMU Financial Markets Certificate - Module 2: Trading & Treasury Sales (IBF Level 1) SMU Executive Certificate in Transaction Banking (IBF Level 1) AWMP Programme III - Wealth Advisory (IBF Level 2)	A.B. Maximus & Co., Pte Ltd A.B. Maximus & Co., Pte Ltd CAIA Association Singapore Office Limited Nanyang Technological University, Wealth Management Institute Ngee Ann Polytechnic SMU Academy – Financial Services SMU Academy – Financial Services SMU Lee Kong Chian School of Business
Customer Relationship and Stakeholder Management	Stakeholder Management	5	Certified Private Banker Level 1 - Market Specialisation (Elective) Private Banking Certification Level 1: Client Relationship Management Private Banking Certification Level 1: Marketing Specialization in the Chinese Market	Nanyang Technological University, Wealth Management Institute SMU Academy SMU Academy

Please click [here](#) to view the Generic Skills and Competencies (GSCs) programme listing.

Please visit <https://www.ibf.org.sg> for the latest list of IBF programmes aligned to the Skills Framework for Financial Services.